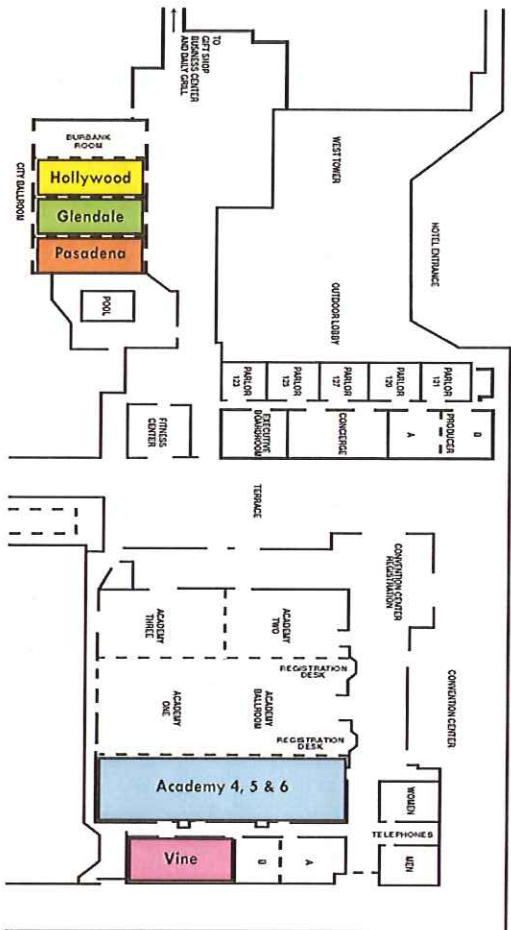


## MEETING ROOM LOCATIONS



## CALIFORNIA EITC & ASSET BUILDING COALITION

The event is sponsored by the California/Nevada Community Action Partnership (Cal/Neva) and convened by the California EITC and Asset Building Coalition (CEABC) and the California Assembly Select Committee on Financial Empowerment.

The CEABC: California/Nevada Community Action Partnership (Cal/Neva), Catholic Charities of California, Citibank, City of Los Angeles, City & County of San Francisco, Hon. California State Senator Carol Liu, Hon. Los Angeles Council Member Richard Alarcon, EARN, Federal Reserve Bank, Greenlining Institute, Community Services Employment & Training, Legal Aid of Orange County and the New America Foundation. Members of the CEABC also include EITC and asset building practitioners and public policy advocates from throughout California.

Together the coalition assists in creating public support by advocating public policy that facilitates asset development at the city, county and state levels as well as developing practitioners who are working with California's low and moderate income population to help them improve their financial stability. The coalition provides a unifying voice for the asset development field in California and coordinates and expands opportunities to improve public policies and practices that benefit low and moderate income families.

For more information go to [cal-neva.org](http://cal-neva.org) or call 916-443-1721



# ADDRESSING POVERTY THROUGH ASSET BUILDING



Symposium to support asset building  
and EITC programs and policies

## AGENDA

Burbank Airport Marriott  
November 15, 2011



## SYMPOSIUM AGENDA

7:30am Check-in

8am Breakfast

9am **Welcome & Opening Keynote Address** Academy 4,5,6

John Wagner (CA Community Services and Development), Darick Simpson (Long Beach Community Action Partnership), Keynote Speaker Quinton Smith (IRS Regional Director)

9:45am Break

10am Workshop Session I

**National Policy Landscape: Protecting Consumers, Building Wealth** Hollywood

*The great recession has devastated communities – particularly communities of color. This panel will discuss the impact of the financial crisis and opportunities to help rebuild wealth in the most impacted communities.*

The Hon. Mike Eng (AD-49), Janis Bowdler (National Council of La Raza), Anne Price (Insight Center for Community Development), Andrea Luquetta (California Reinvestment Coalition)

**Building Wealth, Promoting Health** Glendale

*There are clear connections between poverty, lack of health insurance, and poor health. This panel will explore how the passage of the Affordable Care Act expands access to health and asset building opportunities.*

The Hon. Ed Hernandez (SD-24), Leif Wellington Haase (New America Foundation), Rebecca Flournoy (Policy Link for Health and Place), Carla Saporta (Greenlining Institute)

**Striving for Scale: New Approaches to Matched Savings Accounts** Pasadena

*A variety of innovative new approaches to help students and families save for college are emerging. Learn about the power of Child's Education Savings Accounts, Kindergarten to College, and the "My Future: I'm Saving for It!" programs.*

Rudy Espinoza (Community Financial Resource Center), Jesse Torres (Pan American Bank), Anece Brar (San Francisco Office of Financial Empowerment), Tatiana Siegenthaler (EARN)

**Best Practices for Structuring Collaborations for Grants** Academy 4

*Collaborative grants are the future of foundation investment in asset building. Learn about models that are bringing together community-based organizations and government agencies to serve low-to-moderate income families.*

Frank Ruiz (Community Services & Employment Training, Inc.), Carmen Bernal (United Way of Kern County), May Gina Herr (United Way of Fresno County)

**Building Scale & Sustainability: Exploring Free Tax Program Options for Growth, Funding, & Financial Education** Vine A,B

*Explore ways to grow for free tax services with both donation models and year-round programs and proven ways to link tax services to asset building.*

Jeanette Valencia (Legal Aid Society of Orange County), Manuel Romero (Central California Legal Services), Abigail Marquez (City of Los Angeles), Raul Estrada (El Centro de Ayuda Family Source Center)

11:30am **Afternoon Keynote Address** Academy 4,5,6

The Honorable Los Angeles City Councilmember Richard Alarcon

12noon Lunch

1pm Workshop Session II

**State Policies and Programs: Creating Upward Financial Mobility** Hollywood

*An estimated thirty percent of Californians lack enough savings to get by for three months in the event of a job loss. Learn about new state laws and programs that help Californians access state resources and get back on solid financial footing.*

The Hon. Ricardo Lara (AD-50), Suzanne Reed (Office of California State Senator Liu [SD-21]), Olivia Calderon (New America Foundation), Oscar E. Cruz (Families In Schools), Jenny Chung-Mejia (Insight Center for Community Development)

**Asset Building and the Role of Financial Institutions: Collaborating Beyond EITC & VITA** Glendale

*This panel will provide strategies and examples of how financial institutions & their community partners have collaborated beyond just participating in EITC/VITA endeavors to successfully develop a regional asset building movement.*

Daryl Rutherford (Federal Reserve Bank of San Francisco), Victor Ramirez (Citibank), Marco Ramirez (Center for Asset Building Opportunities), Natalie Bishop (United Way of Orange County)

**Homeownership Opportunities & Foreclosure Prevention** Pasadena

*Many Californians' single largest asset is their home. Learn about legal strategies to keep families out of foreclosure, local and state programs available to assist homeowners, and policy responses at the State level to curb the foreclosure crisis.*

Paul Leonard (Center for Responsible Lending), Yvonne Marijimeñez (Neighborhood Legal Services of Los Angeles County), Doug Swoger (City of Los Angeles)

**Building Practitioner Capacity through Effective Coalitions** Vine A,B

*Learn how to create coalitions focused on asset building and EITC programs for better outreach, practitioner development, and program expansion.*

Catherine Marshall (Capbuilders), Chris Ko (United Way of Greater Los Angeles), Aaron Murphy (Community Action of Butte County Inc.)

2:30pm Break

3pm **Closing Keynote Address** Academy 4,5,6

Ross Chan (CBS), Frank Ruiz (Community Services Employment & Training)

4:30pm Adjournment